



# FILLING YOUR CALENDAR WITH PEOPLE READY TO TALK ABOUT RETIREMENT

Imagine having a calendar full of appointments that you didn't have to do any cold calling to get. Sounds pretty good, right? That's why appointments are the shiny new lead type of the insurance industry.

There are a lot of tools you can use to get these appointments: automations, funnels, Calendly, etc. The question is, why are appointments relevant now more than ever? And how do you start getting these appointments?

## 1. WHY IS THIS WORKING?

- Since COVID, the market has become more comfortable doing business virtually.
- We've also seen a shift in the market where the consumer now desires a sense of control.

## 2: PIVOTING YOUR ASSETS

### Access your current strategy

- Look at each of your assets and figure out their purpose
- You need to understand the point of your assets if you want the consumer to know what you're asking them to do.

### Adjust your lead captures

- Give the option to complete a generic lead form and the option to book an appointment!
- In an ideal funnel, you're capturing leads to outbound call and skimming the low-hanging fruit to set appointments.

## 3: PURCHASING APPOINTMENTS

- If you want to lean heavily into appointments, there are more strategies to take on other than pivoting your assets.
- For example, certain businesses will allow you to purchase appointments at a set quantity and price. This is a great way to go, but you may need to pivot your sales strategy to be set up for success.

## 4: HOW TO PREPARE FOR APPOINTMENTS

You can't approach a pre-set appointment with your go-to pitch. We see agents do this time and time again, and they fail. Most pre-set appointments require an acknowledgment of the process.

Here are points to consider when prepping:

- What is this consumer showing up to this appointment expecting?
  - You need to provide for the client and then offer a solution to be successful.
- What do you need to learn?
  - If the consumer comes to the appointment with a list of questions about their particular state, you need to know the answers! So take the extra time to study or freshen up on the details for the best success.
- Don't reinvent the wheel.
  - If you purchase appointments and receive a script, don't deviate from it. A script is being provided to you because it works! You may be the best in class at selling your product, but that doesn't mean you will be number one at closing appointments.

If you have any questions about these appointments, how to optimize your assets for appointments, or want to know where to potentially purchase them - scan the QR code on your handout to book an appointment.

